

IMPENSA

Self-Service Expenses System

Employee User Guide

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Procedural Note Approval			
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EMPLOYEE USER GUIDE

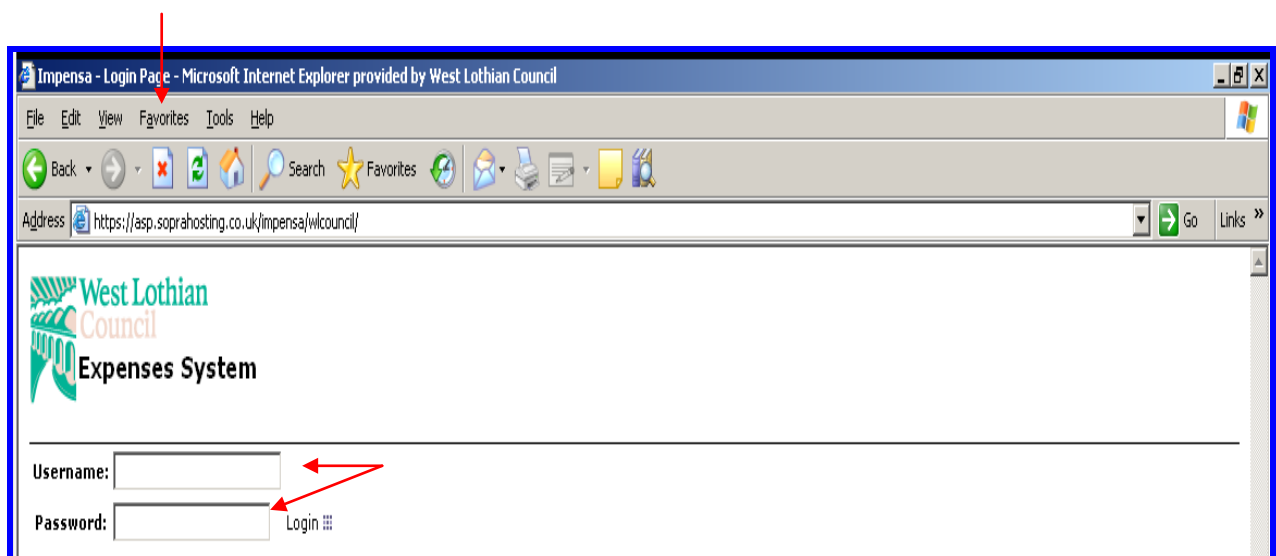
Managers' Note

Please see the separate Managers' Guide for authorising expense claims

1. Impensa Login Screen

For future easy access to Impensa, save the link in your 'Favourites' as follows:

When first on the following screen, click on favourites and from the drop-down list click 'Add to Favourites' and name it (e.g. Impensa Login).



The screenshot shows a Microsoft Internet Explorer window titled "Impensa - Login Page - Microsoft Internet Explorer provided by West Lothian Council". The address bar displays "https://asp.soprahosting.co.uk/impensa/wlcouncil/". The page content features the "West Lothian Council Expenses System" logo. Below the logo, there are two input fields: "Username:" and "Password:". A red arrow points to the "Username:" field, and another red arrow points to the "Password:" field. To the right of the "Password:" field is a "Login" button with a small icon.

To log into the system copy and paste the 'Username' and 'Password' sent to you by Impensa. Now click 'Login'. Your 'Username' is your employee number, which never changes.

After successful login you will see the following screen:

Impensa - Login Page

Before you continue you must agree to the Terms and Conditions outlined below and change your password.

Terms and Conditions

The information on the claims form must be accurate in every respect and it is your responsibility for making sure that it is accurate before you submit the claim.

Claims must only be made for expenses covered by the council's approved Scheme for Reimbursement of Travel and Subsistence Expenses and claims must be made in accordance with the rates and conditions in that Scheme.

Claims must only be made for expenses actually incurred, and vouchers or receipts may be requested.

Claims are subject to scrutiny and audit arrangements by the Council and HMRC (Her Majesty's Revenue and Customs) and you may be asked on occasion to provide more information or to prove your entitlement to the payments claimed. Therefore you should retain a diary detailing all journeys and expenses together with all relevant receipts, tickets, VAT fuel receipts, invoices or any other receipts for a period of at least four years. In addition, checks may be made with the DVLA using the information you have provided.

The council's current Scheme for Reimbursement of Travel and Subsistence Expenses can be obtained from your line manager, or from HR, or via the **intranet**.

When a claim form is submitted you are accepting and undertaking to the council that its contents are accurate and that you are entitled to make the claim and receive payment in respect of your claim.

Should any payment be made to which you are not entitled then the council will pursue recovery in the same way as it would pursue an over-payment of salary.

The submission of inaccurate claims may be regarded as a disciplinary matter and the council may take disciplinary action against you under its Disciplinary Policy and Procedure. You should also be aware that the deliberate falsification of an expenses claim is considered to constitute gross misconduct and in this event the council will take disciplinary action against you under its Disciplinary Policy and Procedure which may lead to dismissal without notice.

In cases of dishonesty, the council may report false claims to the police with a view to criminal prosecution.

If you require any further information please contact the HR Pay & Reward Team at payroll@westlothian.gov.uk.

I confirm that I have read and understood the above Terms and Conditions: ☐

Change Password:

To change your password, enter your current password below.

Current Password:

Now enter your new password, which must have a minimum of 8 characters (a mix of uppercase, lowercase and alpha-numeric characters ONLY). Passwords are case sensitive.

New Password:

Re-type New Password:

[save]

After reading the terms and conditions, confirm you have done so by ticking the box indicated above.

Now change your password in accordance with the following Rules:

2. Password Rules

Passwords must contain a minimum of 8 characters (a mix of uppercase, lowercase and alpha-numeric characters ONLY).

Passwords are case sensitive.

Passwords are valid for 90 days.

You cannot select any of your previous 10 passwords.

On completion, click [Save]

The system will advise you when to change your password. However, you can change it at any time by clicking 'Options' on the right-hand side of the main toolbar and following the instructions. Always click [update] on completion.

You will now see the following screen:

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wlcouncil/options.cgi

File Edit View Favorites Tools Help

Impensa - West Lothian Council

West Lothian Council Expenses System

Eleanor Test 6

Employee View [Switch]

Information Page | Expense Diary | Submissions | Guidelines | Help Options | Logout

1st March - 2011

Welcome to Impensa

✓ Your password has been changed.

i Please add your registered vehicles details below.

Registered Vehicles:

ONLY use to:

- Add an **extra** vehicle for business use; or
- Replace the vehicle with another (if you no longer have the vehicle)

ONLY use to permanently remove a vehicle

[Edit] ONLY use to update a vehicle's details if they are incorrect. Add new vehicles using the icon.

Vehicle Details: Default:

Click to add a new vehicle

[save]

Default Journey Location

Select your **normal** departure location from the dropdown list and it will automatically show each time you enter your **first** expense for the day.

Location: Please Select ...

[save]

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3. Add Registered Vehicle(s)

To enter your vehicle details click on the blue bar indicated above.

Record your vehicle details as requested in the following screen:

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wlcouncil/options.cgi#acquiredDate_vehicleOptions_0Anchor

File Edit View Favorites Tools Help

Impensa - West Lothian Council

West Lothian Council Expenses System

Eleanor Test 6

Employee View [Switch]

Information Page | Expense Diary | Submissions | Guidelines | Help

Options | Logout

1st March - 2011

Welcome to Impensa

Your password has been changed.

Please add your registered vehicles details below.

Registered Vehicles:

ONLY use to:

- Add an **extra** vehicle for business use; or
- Replace the vehicle with another (if you no longer have the vehicle)

ONLY use to permanently remove a vehicle

[Edit] ONLY use to update a vehicle's details if they are incorrect. Add new vehicles using the **+** icon.

Vehicle Details:

Make:

Model:

Registration Number:

Engine capacity: cc

Date Vehicle Acquired: ☐

(Select below as appropriate)

Car/Van: ☐

Motorcycle: ☐

Last Document Check:

Default:

☐

[save]

Default Journey Location

Select your **normal** departure location from the dropdown list and it will automatically show each time you enter your **first** expense for the day.

Location: Please Select ...

[save]

On completion, click the Default radio button on the right of your vehicle details (as shown above). The calendar icon can be used for date vehicle acquired.

Now click [save].

You can add other vehicles (provided you are insured to use them for business), by clicking the **+** sign and following the instructions as before.

If you no longer use a registered vehicle for business travel, remove it by clicking the **-** button below the vehicle details.

Only use [Edit] to correct details for that particular vehicle.

Select your **main** vehicle, by clicking the 'Default' radio button on the right of the vehicle details. The system will auto-populate these details every time you make a claim. You can change this at any time through 'Options'.

Always click [save] after making changes.

You can access this screen at any time by clicking 'Options' on the right-hand side of the main toolbar.

4. Vehicle Documents

When you first make a mileage claim, your manager will be sent an automated e-mail advising him/her to check your original documents for vehicle . . . (registration number). Your manager will not authorise claims until he/she confirms having seen the following documents:

- Current driving licence;
- Comprehensive Motor Insurance Policy and Certificate clearly stating you are insured to use the vehicle for business purposes; and
- A valid current MOT certificate, where required.

You will also receive an automated e-mail asking you to present these documents to your manager for checking.

5. Default Journey Location

If appropriate, select your **normal** departure location from the dropdown list (as indicated). This location will auto-populate each time you enter your **first** expense for the day. Click [save] after making your selection.

6. Impensa's Main Tabs

You are now set-up and ready to claim expenditure necessarily incurred on travel and subsistence in the course of undertaking your official duties. Before commencing, please familiarise yourself with the system's seven main tabs, which are accessible from any screen:

Top left of any screen:

- Information Page (for advice on claiming conditions, deadlines etc)
- Expense Diary (to add your journey mileage and expenses)
- Submissions (to submit your claims at the end of each month)
- Guidelines (to read Scheme for Reimbursement of Travel and Subsistence)
- Help (for advice on using the particular screen you are in)

Top right of any screen:

- Options (to change password etc as explained in 2. above)
- Logout (to logout of Impensa)

7. Information Page

The Information page gives you advice on claiming conditions and links to:

- Scheme for Reimbursement of Travel and Subsistence;
- Internal Audit's Schedule of Mileages; and
- Payroll's e-mail box to ask questions on Impensa and travel/subsistence.

The Information page auto alerts:

- your un-submitted claims and the deadline for submission; and
- counts down at the start of each month, the number of days left to submit your claims.

This is also where the Impensa team posts deadlines for submitting claims for early pay dates (e.g. Christmas/New Year) etc.

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wlccouncil/approvedSubmissions.cgi

File Edit View Favorites Tools Help

Impensa - West Lothian Council

Information Page | Expense Diary | Submissions | Guidelines | Help

Options | Logout

1st March - 2011

Information

Welcome to Impensa, West Lothian Council's new online expenses system. The council will only reimburse travelling expenses wholly, necessarily and exclusively incurred by you in the performance of your duties.

Posted by: Eleanor Walker on 26/01/2011 at 16:10

USER GUIDES:

- [Login Guide](#)
- [Employee Guide](#)
- [Manager Guide](#)

CLAIMING CONDITIONS:

It is important that you submit your expenses claims regularly and on time as claims can only be accepted for THREE months (i.e. the current month and the previous two).

1. Travel and subsistence expenses claims must be in accordance with the council's [Scheme for Reimbursement of Travel and Subsistence](#). Please refer to the Scheme before making a claim.
2. Mileage claimed must be by the shortest route - see the council's [Schedule of Mileages](#)
3. Journeys starting/finishing at your home should only be undertaken in exceptional circumstances and ONLY EXCESS mileage can be claimed.
4. You must keep all receipts for expenditure incurred AND valid VAT receipts for the purchase of fuel for 6 complete tax years. If you wish, you can keep your receipts in electronic format provided the details are legible.

If you have questions or comments please don't hesitate to contact us at payroll@westlothian.gov.uk.

March's Payroll

Please note the deadline for March's payroll is in **9** days time (10th March).

[\[click here to go to the submissions page\]](#)

January's Payroll

You have un-submitted expenses for January totalling **£16.48**, you have **61** days to submit your claim.

[\[click here to go to the submissions page\]](#)

Information Page

User Summary

Name	Eleanor Test 6
Username	9999793

8. Expenses

8.1 Guidelines

Before commencing, you should familiarise yourself with the 'Scheme for Reimbursement of Travel and Subsistence Expenses' – to view the scheme click the 'Guidelines' tab shown in the following screen.

It is important that you submit your claims regularly and on time as claims can only be accepted for three months (i.e. the current month and the previous two).

8.2 Expense Diary

Now click on 'Expense Diary' on top menu tab and add travel expenses/subsistence as follows:

- Choose the required month.
- Choose the required date.
- Click "add expenses".

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wilcouncil/monthList.cgi

West Lothian Council Expenses System

Eleanor Test 6

Employee View [Switch] Options Logout

Information Page | Expense Diary | Submissions | Guidelines | Help

2010 2011

Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug

February - 2011

Date	Title	Journeys	Travel	Costs
1st Feb 2011	Tuesday			
2nd Feb 2011	Wednesday			[add expenses]
3rd Feb 2011	Thursday			
4th Feb 2011	Friday			
5th Feb 2011	Saturday			
6th Feb 2011	Sunday			
7th Feb 2011	Monday			
8th Feb 2011	Tuesday			
9th Feb 2011	Wednesday			
10th Feb 2011	Thursday			
11th Feb 2011	Friday			
12th Feb 2011	Saturday			
13th Feb 2011	Sunday			
14th Feb 2011	Monday			
15th Feb 2011	Tuesday			

Month Breakdown

Month Summary	
Travel	
Journeys:	0
Distance:	0mil.
Mileage:	£0.00
Other Costs:	£0.00
Subsistence	
Costs:	£0.00
Accommodation	
Nights:	0
Costs:	£0.00
Grand Total	
Total:	£0.00

In the following screen, click 'add new expense'.

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wilcouncil/dayList.cgi

West Lothian Council Expenses System

Eleanor Test 6

Employee View [Switch] Options Logout

Information Page | Expense Diary | Submissions | Guidelines | Help

2010 2011

Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug

Wednesday - 2nd February - 2011

This day is not part of a submission. Once you have finished entering details for this day, please remember to add this day using the "Submissions" section.

Type	Start	End	Details	Totals:	0	0mil.	£0.00
[add new expense]							

Day Breakdown

Day Summary	
Travel	
Journeys:	0
Distance:	0mil.
Mileage:	£0.00
Other Costs:	£0.00
Subsistence	
Costs:	£0.00

8.3 Add Mileage/Expenses

The system auto-defaults to 'Journey' and your 'Registered Vehicle'. If you travel by bus, train etc, in 'Method of Travel' click ▼ and select from the dropdown list.

Information Page | Expense Diary | Submissions | Guidelines | Help Options | Logout

2010												2011																										
Aug			Sep			Oct			Nov			Dec			Jan			[Feb]			Mar			Apr			May			Jun			Jul			Aug		
T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M				
1	(2)	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28											

Wednesday - 2nd February - 2011

⚠ This day is not part of a submission. Once you have finished entering details for this day, please remember to add this day using the "Submissions" section.

Type	Start	End	Details	Totals	0	0mil.	Information	£0.00
[add new expense]								

Add New Journey Expense Select Type: Journey ▼

- Departure Location & Time**
From: Please select... at 08 : 00
- Arrival Location & Time**
To: Please select... at 08 : 00
- Purpose**
Purpose of Journey: Please fully explain the purpose of your journey. Specifying just "Meeting" is not enough.
- Method of Travel**
Reg Car/Van - WLC 59 IMP (Default)
Distance: SINGLE journey miles Click to view the [Schedule of Mileages](#)
Other Expenses: £
Make: Audi
Model: A4
Reg No: WLC 59 IMP
Engine Capacity: 2000 cc
- Receipt**
Fuel VAT Receipt: ☐
Other Expenses VAT Receipt: ☐
- Return Journey**
☒ Selecting this checkbox will create a return journey matching the details which you have entered.
Departure Time: 08 : 00
Arrival Time: 08 : 00

[save expense]

Day Breakdown

Day Summary

Travel	
Journeys:	0
Distance:	0mil.
Mileage:	£0.00
Other Costs:	£0.00
Subsistence	
Costs:	£0.00
Accommodation	
Nights:	0
Costs:	£0.00
Grand Total	
Total:	£0.00

Complete each box in sequence, using ▼ dropdown lists where available

If your departure or arrival location is not listed choose either:

- 'Other Workplace' if it is a recognised council workplace'; or
- 'Other Non-Workplace' (e.g. Edinburgh). For audit purposes, you are required to give a full explanation in 'Purpose of Journey' - "meeting" and "return" are not enough.

In 'Purpose of Journey' Internal Audit requires a full explanation (e.g. meeting or site visit etc. is not acceptable).

In 'Distance', enter **single** journey miles. Some journey miles will auto-populate. If not, click on 'Schedule of Mileages' (on right of 'Single journey miles') for the council's approved mileage for your journey. If your journey is not listed, travel by the shortest possible route.

'Receipt' – confirm you have valid fuel VAT and expenses receipts. You must have at least one valid fuel VAT receipt per monthly submission.

HMRC requires you to keep all receipts for expenditure incurred and your fuel VAT receipts for 6 complete tax years.

'Return Journey' – if returning to your original location, tick the return journey box and amend your return times. The system automatically doubles your mileage for the round trip.

Click **[Save expense]**.

8.4 Subsistence expenses:

Click 'add new expense' as shown below:

West Lothian Council Expenses System

Information Page | Expense Diary | Submissions | Guidelines | Help

Options | Logout

Employee View [Switch]

Jul Aug Sep 2010 Oct Nov Dec [Jan] Feb Mar 2011 Apr May Jun Jul

S 1 2 3 4 [5] 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Wednesday - 5th January - 2011

This day is not part of a submission. Once you have finished entering details for this day, please remember to add this day using the "Submissions" section.

Type	Start	End	Details	Information
Journey	08:00	08:30	Journey from Civic Centre to County Buildings, Linlithgow	Other Car/Van 11.10mil. £0.00
Journey	12:00	12:30	Journey from County Buildings, Linlithgow to Civic Centre	Other Car/Van 11.10mil. £0.00
Journey	12:30	13:00	Journey from Civic Centre to Armadale Academy	Other Car/Van 9.50mil. £0.00
Journey	14:30	15:00	Journey from Armadale Academy to Civic Centre	Other Car/Van 9.50mil. £0.00
Totals: 0.00				41.20mil. £0.00

[add new expense]

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Day Breakdown

Day Summary

Travel

Journeys: 4.00
Distance: 41.20mil.
Mileage: £16.48
Other Costs: £0.00

Subsistence

Costs: £0.00

Accommodation

Nights: 0
Costs: £0.00

Grand Total

Total: £16.48

In the next screen, if you are claiming Subsistence, click▼ and select from the dropdown list.

West Lothian Council Expenses System

Information Page | Expense Diary | Submissions | Guidelines | Help

Options | Logout

Employee View [Switch]

Aug Sep 2010 Oct Nov Dec [Jan] Feb Mar 2011 Apr May Jun Jul Aug

T 1 2 [3] 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28

Thursday - 3rd February - 2011

This day is not part of a submission. Once you have finished entering details for this day, please remember to add this day using the "Submissions" section.

Type	Start	End	Details	Information
Totals: 0				0mil. £0.00

[add new expense]

Add New Subsistence Expense

Select Type: Subsistence ▼

1. Start Time: 08:00 2. End Time: 08:00

3. Details

Purpose: [Text Box] Type: Breakfast ▼

4. Costs

Cost: £ [Text Box]

5. Receipt

VAT Receipt: ☐ Non-VAT Receipt: ☐

[save expense]

Day Breakdown

Day Summary

Travel

Journeys: 0
Distance: 0mil.
Mileage: £0.00
Other Costs: £0.00

Subsistence

Costs: £0.00

Accommodation

Nights: 0
Costs: £0.00

Grand Total

Total: £0.00

Complete all fields using dropdown lists as required. In 'Purpose' detail why subsistence was necessary ("Meeting or Site Visit" is not sufficient). Also give the location. You **must** have a valid receipt and tick appropriate box. Only tick the VAT Receipt box if receipt has a VAT registration number).

Click [Save expense].

8.5 Accommodation expenses

Click 'add new expense'. In 'Select Type' in the following screen, select 'Accommodation' from the dropdown list ▼.

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wl/council/dayList.cgi

West Lothian Council Expenses System

Employee View [Switch] Options Logout

Information Page | Expense Diary | Submissions | Guidelines | Help

2010 2011

Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul

S S M T W T F S S M T W T F S S M T W T F S S M T W T F S S M

1 2 3 4 (5) 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Wednesday - 5th January - 2011

This day is not part of a submission. Once you have finished entering details for this day, please remember to add this day using the "Submissions" section.

Type	Start	End	Details	Information
Journey	08:00	08:30	Journey from Civic Centre to County Buildings, Linlithgow	Other Car/Van 11.10mil. £0.00
Journey	12:00	12:30	Journey from County Buildings, Linlithgow to Civic Centre	Other Car/Van 11.10mil. £0.00
Journey	12:30	13:00	Journey from Civic Centre to Armadale Academy	Other Car/Van 9.50mil. £0.00
Journey	14:30	15:00	Journey from Armadale Academy to Civic Centre	Other Car/Van 9.50mil. £0.00
Totals:			0.00	41.20mil. £0.00

[add new expense]

Add New Accommodation Expense

Select Type: Accommodation ▼

1. Start Time & Location

From: 15 : 00

Number of Nights: 1 (The cost for multiple nights will be associated with the last night of the stay and as such you cannot create an expense which ends in the future)

Checkout Time: 15 : 00

2. Purpose

Purpose of Stay:

3. Address

Address of Accommodation:

4. Costs

Cost: £

5. Receipt

VAT Receipt: ☐

[save expense]

Day Breakdown

Day Summary

Travel

Journeys: 4.00

Distance: 41.20mil.

Mileage: £16.48

Other Costs: £0.00

Subsistence

Costs: £0.00

Accommodation

Nights: 0

Costs: £0.00

Grand Total

Total: £16.48

Complete ALL fields using dropdown lists ▼ as required. Give full reason accommodation was necessary ("Meeting" is not sufficient).

You MUST have a valid VAT receipt. Tick the VAT Receipt box indicated above.

Click [Save expense].

'Day Breakdown' on the right-hand side of these screens gives a summary of mileage/ expenses claimed for that particular day.

9. Submissions

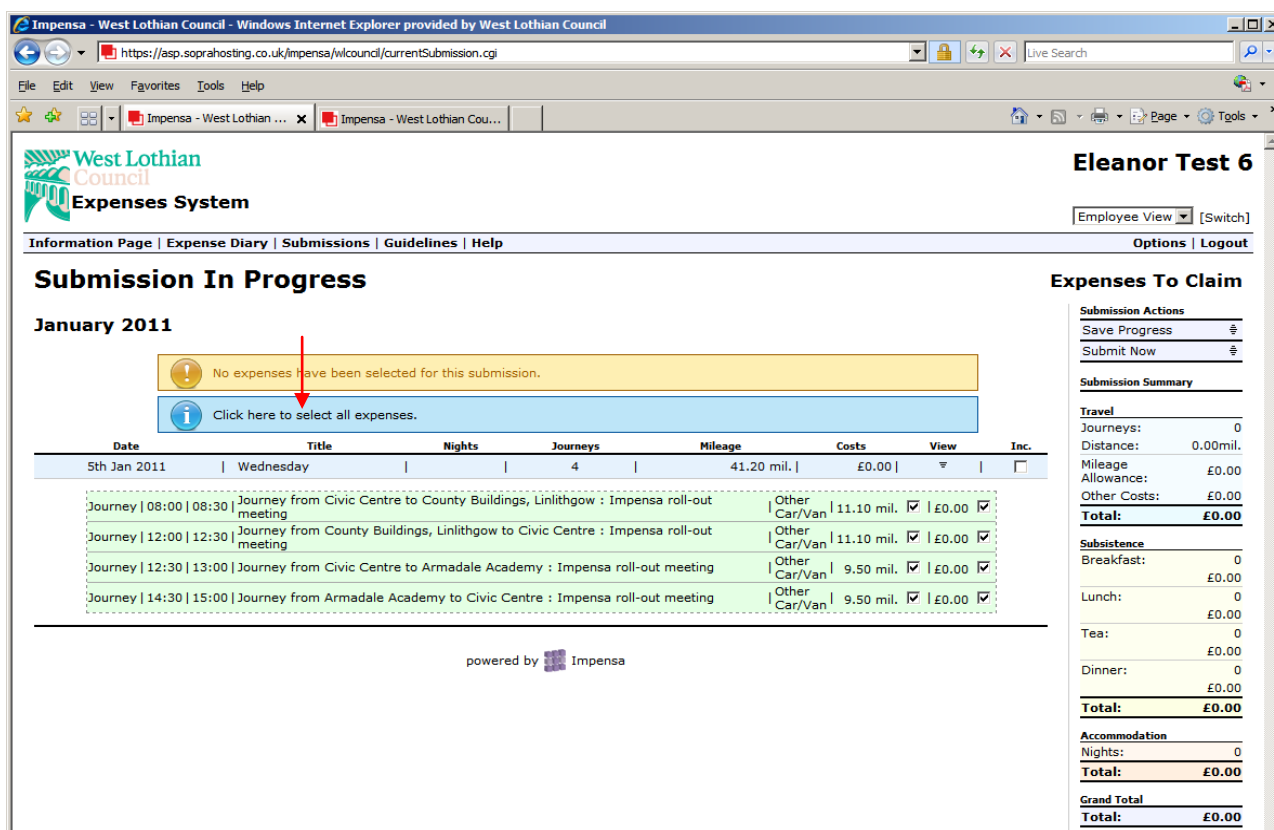
BEFORE submitting claims, check they are correct, as you cannot change or delete them after submission.

Claims must be with Payroll no later than 10th of each month for payment in that month, unless otherwise advised on the Information page.

To submit your claim for payment, click 'Submissions' on the main menu tab. Now click on the 'Add a new submission' bar as shown below.



Click on the blue banner shown below to select all of your expenses.



The next screen shows your submission is now in progress.

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wlouncil/approvedSubmissions.cgi

File Edit View Favorites Tools Help

Impensa - West Lothian Council

West Lothian Council Expenses System

Employee View [Switch]

Information Page | Expense Diary | Submissions | Guidelines | Help

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Submission In Progress

Warning Banners:

- ✖ Your submission is currently greater than the maximum monthly submission limit of £10.00.
- ! Your submission is currently greater than the maximum mileage limit of 10 miles.
- i Changes have been made to your submission. Please remember to save your progress.

Expenses To Claim

Submission Actions

Save Progress

Submit Now

Submission Summary

Travel

Journeys: 4

Distance: 41.2mil.

Mileage Allowance: £16.48

Other Costs: £0.00

Total: £16.48

Subsistence

Breakfast: 0

£0.00

Lunch: 0

£0.00

Tea: 0

£0.00

Dinner: 0

£0.00

Total: £0.00

Accommodation

Nights: 0

Total: £0.00

Grand Total

Total: £16.48

January 2011

Date	Title	Nights	Journeys	Mileage	Costs	View	Inc.
5th Jan 2011	Wednesday		4	41.20 mil.	£0.00		<input checked="" type="checkbox"/>
Journey 08:00 08:30	Journey from Civic Centre to County Buildings, Linlithgow : Impensa roll-out meeting			Other Car/Van 11.10 mil.	✓ £0.00	<input checked="" type="checkbox"/>	
Journey 12:00 12:30	Journey from County Buildings, Linlithgow to Civic Centre : Impensa roll-out meeting			Other Car/Van 11.10 mil.	✓ £0.00	<input checked="" type="checkbox"/>	
Journey 12:30 13:00	Journey from Civic Centre to Armadale Academy : Impensa roll-out meeting			Other Car/Van 9.50 mil.	✓ £0.00	<input checked="" type="checkbox"/>	
Journey 14:30 15:00	Journey from Armadale Academy to Civic Centre : Impensa roll-out meeting			Other Car/Van 9.50 mil.	✓ £0.00	<input checked="" type="checkbox"/>	

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The above red and yellow banners show if your claims are over your Service's limit. This just means that your claims will be sent to your manager for approval and submission to Payroll.

If you are happy that your claims are correct follow the instructions in the blue banner and click 'Save Progress' under Expenses to Claim.

As shown below, you will now see a list of your journeys. The 'Expenses to Claim' on the right-hand side lists your total claims for the period:

West Lothian Council Expenses System

Employee View [Switch] Options Logout

Information Page | Expense Diary | Submissions | Guidelines | Help

Submission In Progress

Your submission is currently greater than the maximum monthly submission limit of £10.00.

Your submission is currently greater than the maximum mileage limit of 10 miles.

January 2011

Date	Title	Nights	Journeys	Mileage	Costs	View	Inc.
5th Jan 2011	Wednesday		4	41.20 mil.	£0.00	≡	<input checked="" type="checkbox"/>
<div> Journey 08:00 08:30 Journey from Civic Centre to County Buildings, Linlithgow : Impensa roll-out meeting Other Car/Van 11.10 mil. <input checked="" type="checkbox"/> £0.00 <input checked="" type="checkbox"/> </div> <div> Journey 12:00 12:30 Journey from County Buildings, Linlithgow to Civic Centre : Impensa roll-out meeting Other Car/Van 11.10 mil. <input checked="" type="checkbox"/> £0.00 <input checked="" type="checkbox"/> </div> <div> Journey 12:30 13:00 Journey from Civic Centre to Armadale Academy : Impensa roll-out meeting Other Car/Van 9.50 mil. <input checked="" type="checkbox"/> £0.00 <input checked="" type="checkbox"/> </div> <div> Journey 14:30 15:00 Journey from Armadale Academy to Civic Centre : Impensa roll-out meeting Other Car/Van 9.50 mil. <input checked="" type="checkbox"/> £0.00 <input checked="" type="checkbox"/> </div>							

powered by Impensa

Expenses To Claim

Submission Actions

Save Progress

Submit Now

Submission Summary

Travel

Journeys: 4

Distance: 41.20mil.

Mileage Allowance: £16.48

Other Costs: £0.00

Total: £16.48

Subsistence

Breakfast: 0

£0.00

Lunch: 0

£0.00

Tea: 0

£0.00

Dinner: 0

£0.00

Total: £0.00

Accommodation

Nights: 0

Total: £0.00

Grand Total

Total: £16.48

10. Make Changes

If you realise at this point that you've made a mistake, you must remove the 'Inc' tick from the particular claim to be changed as shown above.

Make your changes on the following screen:

Impensa - West Lothian Council - Windows Internet Explorer provided by West Lothian Council

https://asp.soprahosting.co.uk/impensa/wl/council/currentSubmission.cgi

File Edit View Favorites Tools Help

Impensa - West Lothian Council

West Lothian Council Expenses System

Employee View [Switch]

Information Page | Expense Diary | Submissions | Guidelines | Help

Options | Logout

Submission In Progress

Changes have been made to your submission. Please remember to save your progress.

January 2011

No expenses have been selected for this submission.

Click here to select all expenses.

Date	Title	Nights	Journeys	Mileage	Costs	View	Inc.
5th Jan 2011	Wednesday		4	41.20 mil.	£0.00	£	<input type="checkbox"/>
Journey 08:00 08:30 Journey from Civic Centre to County Buildings, Linlithgow : Impensa roll-out meeting							
				Other Car/Van 11.10 mil.	£0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Journey 12:00 12:30 Journey from County Buildings, Linlithgow to Civic Centre : Impensa roll-out meeting							
				Other Car/Van 11.10 mil.	£0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Journey 12:30 13:00 Journey from Civic Centre to Armadale Academy : Impensa roll-out meeting							
				Other Car/Van 9.50 mil.	£0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Journey 14:30 15:00 Journey from Armadale Academy to Civic Centre : Impensa roll-out meeting							
				Other Car/Van 9.50 mil.	£0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

powered by Impensa

Expenses To Claim

Submission Actions

Save Progress

Submit Now

Submission Summary

Travel

Journeys: 0

Distance: 0mil.

Mileage Allowance: £0.00

Other Costs: £0.00

Total: £0.00

Subsistence

Breakfast: 0

£0.00

Lunch: 0

£0.00

Tea: 0

£0.00

Dinner: 0

£0.00

Total: £0.00

Click on the following, in sequence:

- 'Save Progress';
- 'Expense Diary';
- Month/Day to be changed;
- 'View Day Breakdown'
- Journey to be changed/deleted (see [delete expense] option at bottom-middle of screen);
- Make your changes and [save expense] or [delete expense] as required;
- 'Submissions';
- Month you have changed; and
- Click here to select all expenses.

As you select expenses the summary on the side bar will detail amounts to be paid.

Click 'Submit Now' when finished.

11. Declaration

You must read and agree the terms of submission before submitting. The [Submit] button will not be available until you tick the declaration boxes.

Details of your submission are shown on the declaration. Please make sure your claims are correct before continuing.

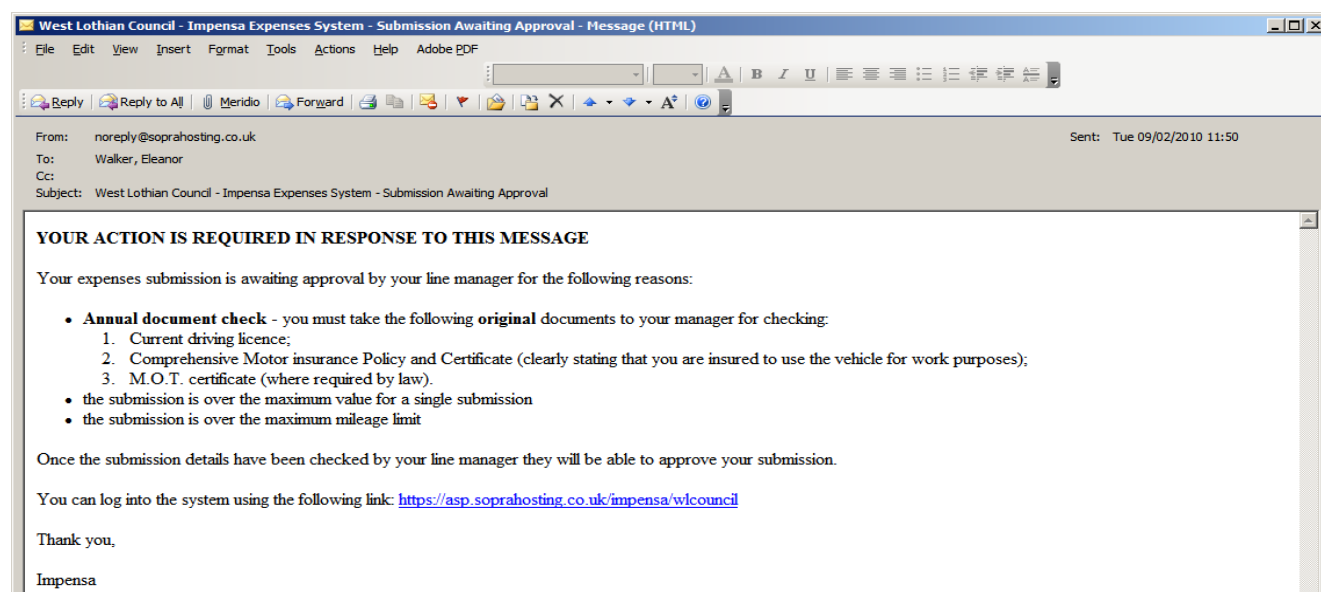
Your last chance to make changes is to click [Cancel] in the bottom-left of the following screen and follow the instructions under section 10 above. **You cannot make changes after submission.**

If you are happy that your claims are correct, tick the declaration boxes to confirm that the statements apply to you. Now click 'Submit'.

When claims are submitted the following message will appear:

Your Manager will be sent an e-mail advising of any claims that exceed your Service's set limits, as they need your Manager's approval.

You will also receive a message as follows:



On your first submission, then annually, you must submit to your Manager:

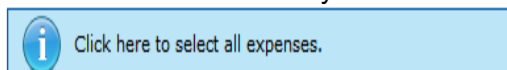
- a valid driving licence;
- Comprehensive Motor Insurance Policy and Certificate (clearly stating that you are insured to use your vehicle for business purposes); and
- an M.O.T. certificate (where required by law).

Your Manager can then update Impensa and your claim will be processed for payment.

12. Submission Status

Submission in Progress

You have not submitted your claim. Check all 'Inc.' boxes are ticked by clicking on the banner



then 'Save Progress' and 'Submit Now'.

Not Yet Submitted

You have not submitted your claim (see above to progress)

Pending Manager's Approval

Claim requires your manager's approval

Rejected

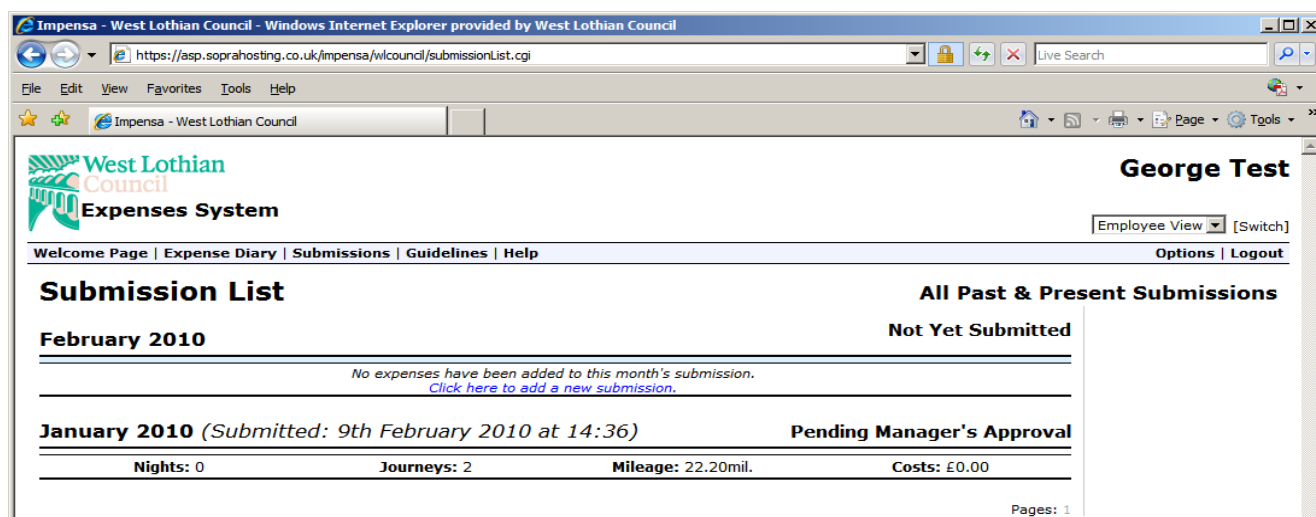
Contact your manager to discuss expenses claim rejection

Pending Action by Payroll

Claim successfully submitted

Processed

Claim paid and you have a permanent record available for viewing.



Remember to check submission status prior to the payroll cut-off dates.

End of process.

13. Options Page

Click 'Options' on the right-hand side of the main header at any time to:

- Change your Password;
- Add/change vehicle details; and
- Select/change your Default Journey Location

14. Help

Choose help from the menu tab to view information relevant to the screen you are using.

15. Record Keeping

Internal Audit verification requirements

You must ensure that the purpose of your journey is fully explained in the 'Purpose of Journey' box. For example, meeting or site visit etc. is not acceptable.

HMRC Requirements

HMRC requires you to keep all receipts for expenditure incurred **and** valid VAT receipts for the purchase of fuel for 6 complete tax years. If you wish, you can keep your receipts in electronic format provided the details are legible.

APPENDIX 1

Impensa – Employee Self-Service Expenses System PC Troubleshooting Guide

To assist Users who experience problems accessing Impensa or using functions within the system.

Minimum Requirement

The minimum specification for Desktop/Laptop Computers is Internet Explorer 6 (IE6), which most council computers are.

To check yours: Launch Internet Explorer, go to 'Help' > 'About Internet Explorer'. If your version is lower than 6, your PC may need to be upgraded (contact Allison Mathieson in the first instance).

The minimum screen resolution is 800x600 but things may appear cluttered and the display incomplete. The recommended resolution is 1024x768. Right click on your desktop, click properties, click settings and drag the arrow on resolutions to at least that recommended.

Housekeeping

To ensure optimal performance, all users should routinely clear out their PC or laptop.

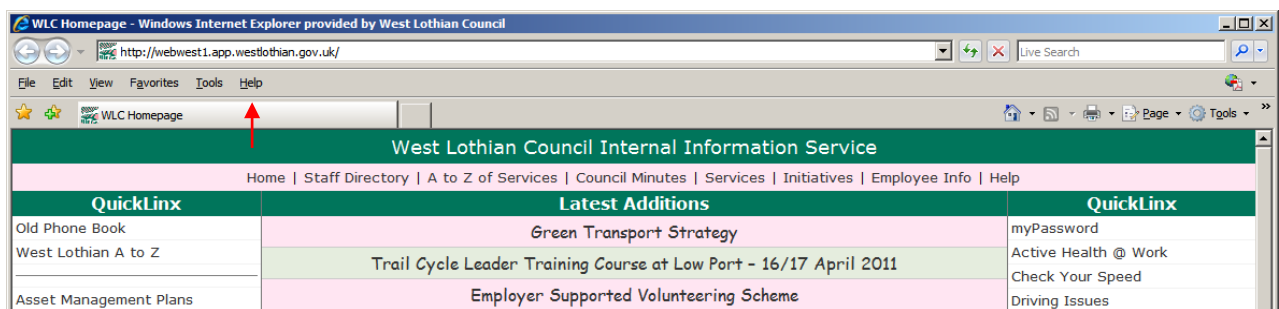
Internet Explorer Version 6

To clear out your temporary Internet files and cookies go to Internet Explorer:

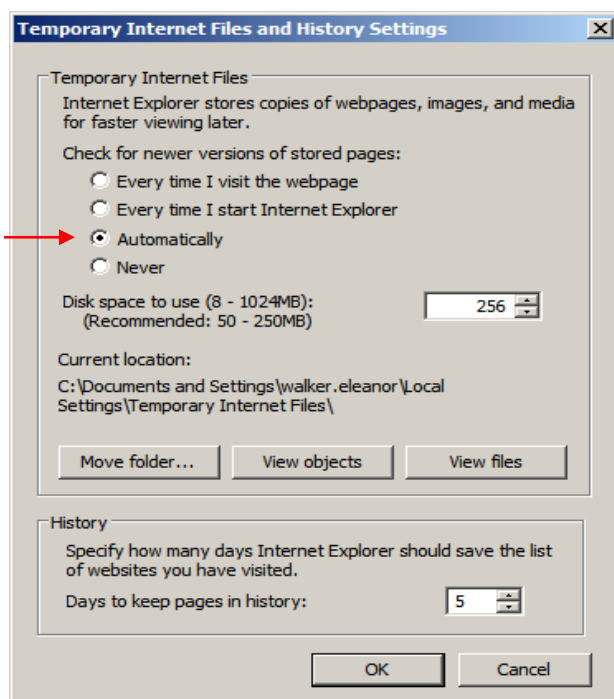
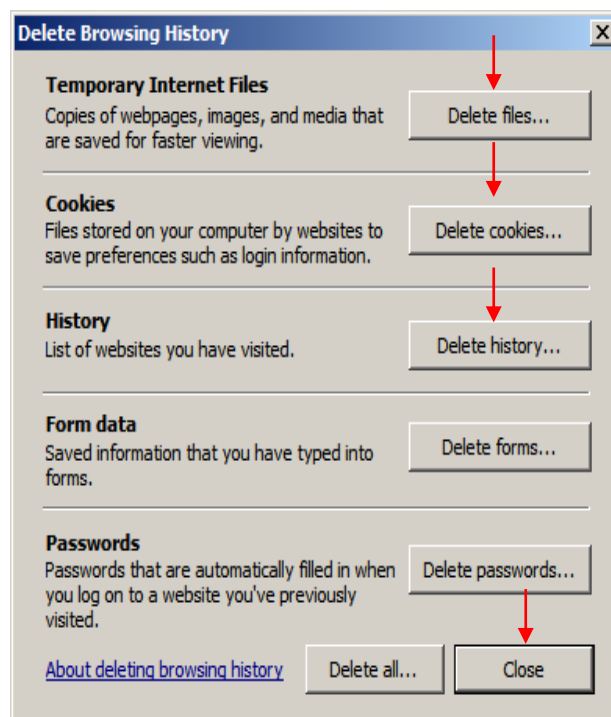
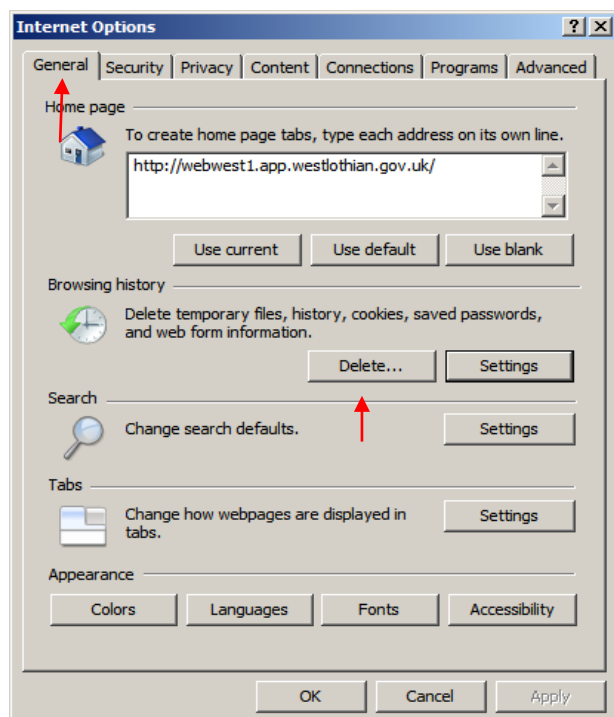
- select 'Tools' > 'Internet Options' > 'General Tab';
- click on the 'Delete Cookies' button in the 'Temporary Internet Files' section;
- click Delete Files button; and
- click OK.

Internet Explorer Version 7

Click on 'Help' as shown below, then on 'About Internet Explorer' from the dropdown list.



When you see the 1st screen, click 'General', then 'Delete' as shown below. Then on the 2nd screen click the 'Temporary Internet File', 'Cookies' and 'History' buttons indicated, then 'Close'. On the 3rd screen click the 'Automatically' radio-button, then 'OK'.



Cache Refresh

Each time you visit a Website, your browser may automatically store a copy of the pages you visit on your hard drive. This is called caching. However, you may not always see the most recent version next time you access the web page.

There may be a caching problem with some of the JavaScript files used to verify Impensa commands. To force the browser to get the most up to date version of all files from the server:

- Click the refresh button (or F5 on the keyboard) together with the shift key, and then click retry.

Alternatively, set your browser to not store pages and always retrieve the latest version. Go to Internet Explorer:

- select 'Tools' > 'Internet Options'> 'General Tab'> Click Settings within the 'Temporary Internet Files' section; and
- select the option 'Every visit to the page' When finished click OK.